

# User Manual

In order to use the Content Approval Plugin, you must go to the Admin section of the CMS and after it, to the Config Tab, Tool Settings and finally Content Approval Work Flow Plugin

Dashboard **CMS** Tokens  
Edit **Admin** Reports Visitor Groups

Admin **Config** Content Type

- System Configuration
  - System Settings
  - Manage Websites
  - Manage Website Languages
  - Edit Categories
  - Edit Frames
  - Edit Tabs
- Property Configuration
  - Edit Custom Property Types
- Security
  - Permissions for Functions
- Tool Settings
  - Plug-in Manager
  - Mirroring
  - Rebuild Name for Web Addresses
  - Sitemap Administration Plugin
  - Content Approval Work Flow Plugin**
  - Search Configuration

## Content Approval Work Flow Plugin ?

It allows to configure content approval workflows, choose them by page types or folders.

Definitions by Page Type    Definitions by Folder    Content Approval Definitions

Content Type Name	Content Approval Definition
StartPage	None ▾
StandardPage	None ▾
SearchPage	None ▾
ProductPage	None ▾
LandingPage	None ▾
NewsPage	None ▾
ContactPage	None ▾
ArticlePage	None ▾
ContainerPage	None ▾

[Update approval definitions by page type](#)

To create a new content approval workflow, you must go to the Content Approval Definitions tab and press the button Add new content approval definition

## Content Approval Work Flow Plugin ?

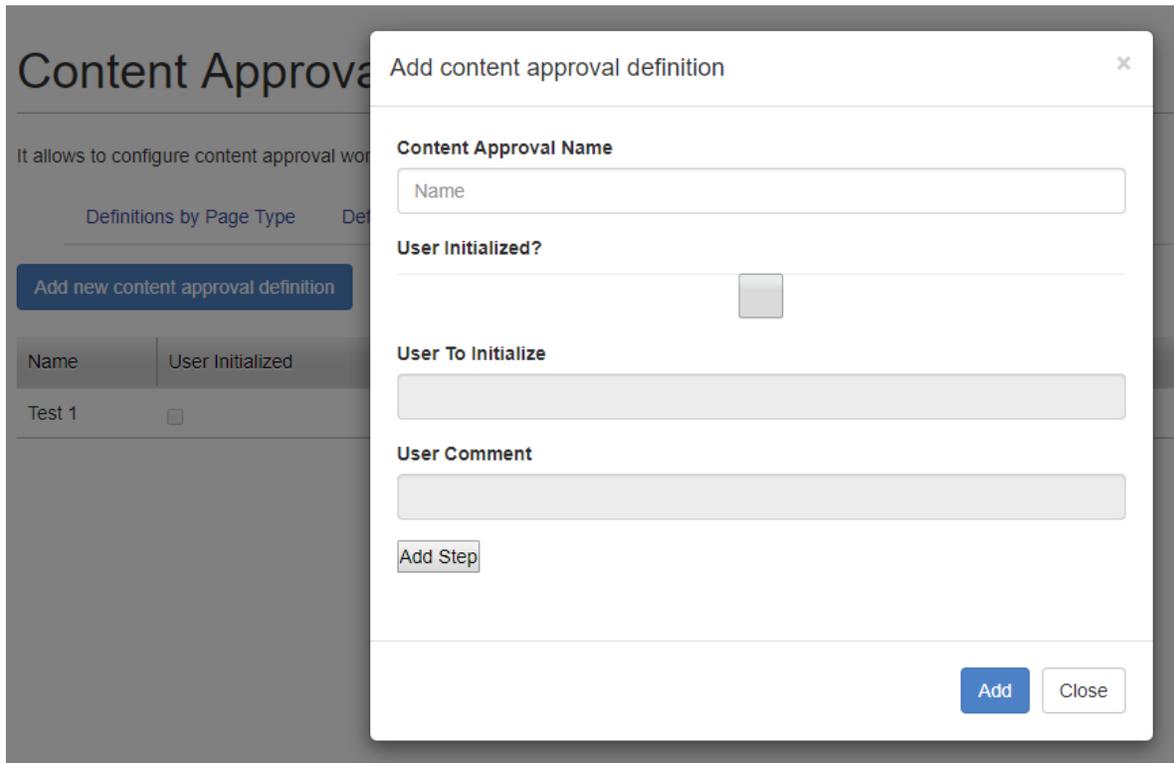
It allows to configure content approval workflows, choose them by page types or folders.

Definitions by Page Type    Definitions by Folder    **Content Approval Definitions**

[Add new content approval definition](#)

Name	User Initialized	User To Initialize	Comment	Actions
Test 1	<input type="checkbox"/>			<a href="#">Edit</a>   <a href="#">Delete</a>

This will display a modal which will allow you to create a content approval workflow based on what you need.



The image shows a modal window titled "Add content approval definition" overlaid on a background interface. The modal contains the following fields and controls:

- Content Approval Name:** A text input field with the placeholder text "Name".
- User Initialized?:** A checkbox control.
- User To Initialize:** A text input field, currently disabled.
- User Comment:** A text input field.
- Add Step:** A button located below the User Comment field.
- Buttons:** "Add" and "Close" buttons at the bottom right of the modal.

In the background, a table is partially visible with columns "Name" and "User Initialized". One row contains "Test 1" and an unchecked checkbox.

The description of each field is explained in more detail bellow:

**Content approval name:** name of the content approval, it is just a reference for the DDS item. Content approvals at the CMS level do not have names

#### Content Approval Name

**User Initialized:** checkbox to set if the content approval is initialized by the user or it is initialized by an editor (by default is not checked, editor initialized)

#### User Initialized?

**User to Initialize:** if the checkbox user initialized is set to true, this field is enabled. It specifies the editor user that initializes the approval workflow when a client create a specific page or block inside a folder assigned with this content approval definition. This will make the workflow for the item created by the client to be at step 2 instead of step 1

because step 1 is initialized by the client. **Therefore, a content approval workflow which initialized by a client, requires at least 2 steps**

#### User To Initialize

**User Comment:** if the checkbox user initialized is set to true, this field is enabled. It specifies the default comment that the editor user is going to set when the content approval is initialized by an item created by the client

#### User Comment

To create a new step, you must press the add step button inside the modal. This will add one more field and two extra buttons inside the modal.

## Step

#### Content Approval Step Name

**Content Approval Step Name:** is the name of the step, this has a direct relation to the step name in the CMS UI for content approvals.

#### Content Approval Step Name

**Delete Step:** this button will remove the current step, including any reviewer that has been added to the step.

To create a new reviewer, you must press the add reviewer button which will add two more fields to handle the reviewer and a button to delete the current reviewer. You can add as many reviewers as you want per step

# Reviewer

## Content Approval Reviewer

Reviewer Type

**Content Approval Reviewer:** is the user name of user role that is going to be used as reviewer of the step.

## Content Approval Reviewer

**Reviewer Type:** is the type of reviewer that is going to approve this step. If role is selected, the content approval reviewer field must use a role name. Otherwise, if user is selected, the content approval reviewer field must be a user name from the CMS

Reviewer Type

**Delete Reviewer:** this button will remove the current reviewer from the current step.

After everything is configured as expected you can press the Add button to create the content approval workflow, or press the close button to cancel the process

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To edit or delete a previously create content approval workflow you can press the action links at the right side of each content approval definition row

Name	User Initialized	User To Initialize	Comment	Actions
Test 1	<input type="checkbox"/>			<a href="#">Edit</a>   <a href="#">Delete</a>

If the delete action link is pressed, a modal asking if you are sure, will be shown to the user. If confirmed, the content approval workflow will be removed. **Consider that if the content approval workflow is being assigned to a page type or block type it will throw an error and will not remove the workflow definition**

localhost:54868 says

Are you sure you want to delete this Record?

If the edit action link is pressed, the same modal to create a new content approval workflow will appear, but with the information related to that specific content approval definition

**Content Approval**

It allows to configure content approval workflow

Definitions by Page Type | Definitions by Block Type

[Add new content approval definition](#)

Name	User Initialized
Test 1	<input type="checkbox"/>

**Content Approval Name**

**User Initialized?**

**User To Initialize**

**User Comment**

**Step**

**Content Approval Step Name**

**Reviewer**

**Content Approval Reviewer**

**Reviewer Type**  ▾

After the content approval workflow is created, you can visit the definitions by page type or definitions by folder tabs and assign the previously created workflow to any of the page types or folder. To do this, choose a page type or folder type you want and in the combo box next to its name choose the content approval workflow you want to use. After choosing them, you can press the button update approval definitions by page type or update approval definitions by folder type to save the information

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StandardPage	Test 1 ▼
SearchPage	None ▼
ProductPage	None ▼
LandingPage	None ▼
NewsPage	None ▼
ContactPage	None ▼
ArticlePage	None ▼ None ▼
ContainerPage	Test 1 ▼

Update approval definitions by page type

## Content Approval Work Flow Plugin ?

It allows to configure content approval workflows, choose them by page types or folders.

Definitions by Page Type   Definitions by Folder   Content Approval Definitions

Folder name	Content Approval Definition
Alloy Meet	None ▼
Alloy Plan	None ▼
Alloy Track	None ▼
Alloy Track Video	Test 1 ▼
Contact portraits	None ▼
Customer Zone	None ▼
Events	None ▼
News	None ▼
Startpage	None ▼ None ▼ Test 1 ▼

Update approval definitions by folder

If the selection is saved successfully, it will show a success modal. Consider, that to save workflows to a page type, it requires to press the button update approval definitions by page type, if you use the button for folders, it will not save the data corresponding to page types.

The screenshot shows the 'Content Approval Work Flow Plugin' interface with a success modal displayed. The modal has a title 'Success!!!' and a close button (X). The message inside the modal reads: 'Approval definitions by page and folders updated successfully'. Below the modal, the 'Definitions by Page Type' tab is active, showing a table with 'Content Type Name' and 'Content Approval Definition' columns. The 'StartPage' row is highlighted, and the 'None' dropdown menu is open, showing 'None' and 'Test 1' options. The 'Update approval definitions by page type' button is visible at the bottom of the interface.

After the workflow is applied to a page type or folder, you can start creating pages of that type or blocks below the selected folder to see the content approval workflow in action. For instance, we can create a standard page anywhere below the home page

New Page: Standard Page

Start [Create](#) [Cancel](#)

Name

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Required properties

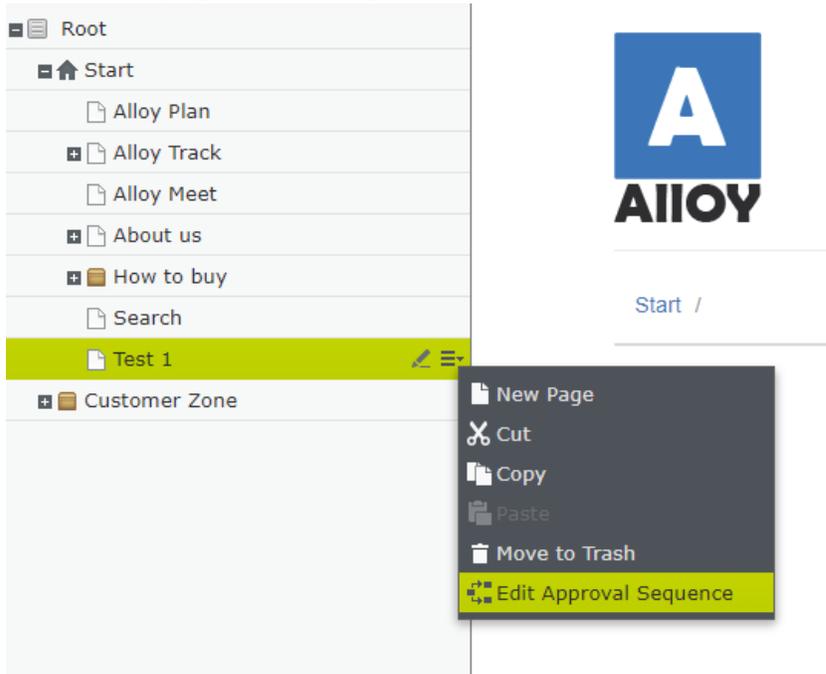
SMMLEditor

Key

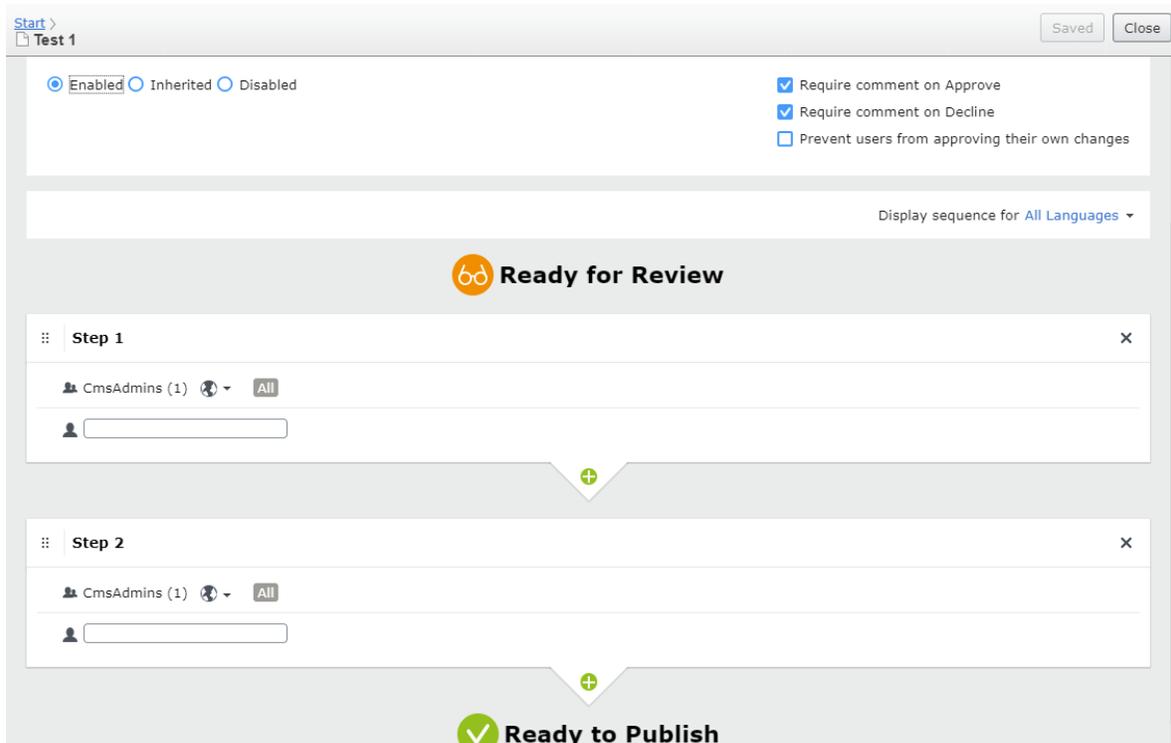
After creation, the page cannot be published immediately. Now, it requires a sequence of steps before being able to be published.

The screenshot shows a web editor interface for a page titled "Test 1". At the top left, there is a breadcrumb "Start > Test 1". The page content includes the "Alloy" logo, a navigation menu with "Start", "Alloy Plan", "Alloy Track", "Alloy Meet", and "About us", and a main content area with a large "Test 1" heading and several empty text blocks. A notification overlay is present in the top right, stating "Last changed by you, 33 seconds ago." and "Ready for Review". Below this, it says "Not published yet" and provides a "Revert to Published" button. The footer contains four columns: "Products" (Alloy Plan, Alloy Track, Alloy Meet), "The Company" (About us, News & Events, Management, Contact us, Become a reseller), "News & Events" (Events, Press Releases), and "Customer Zone" (Reseller extranet, Log out).

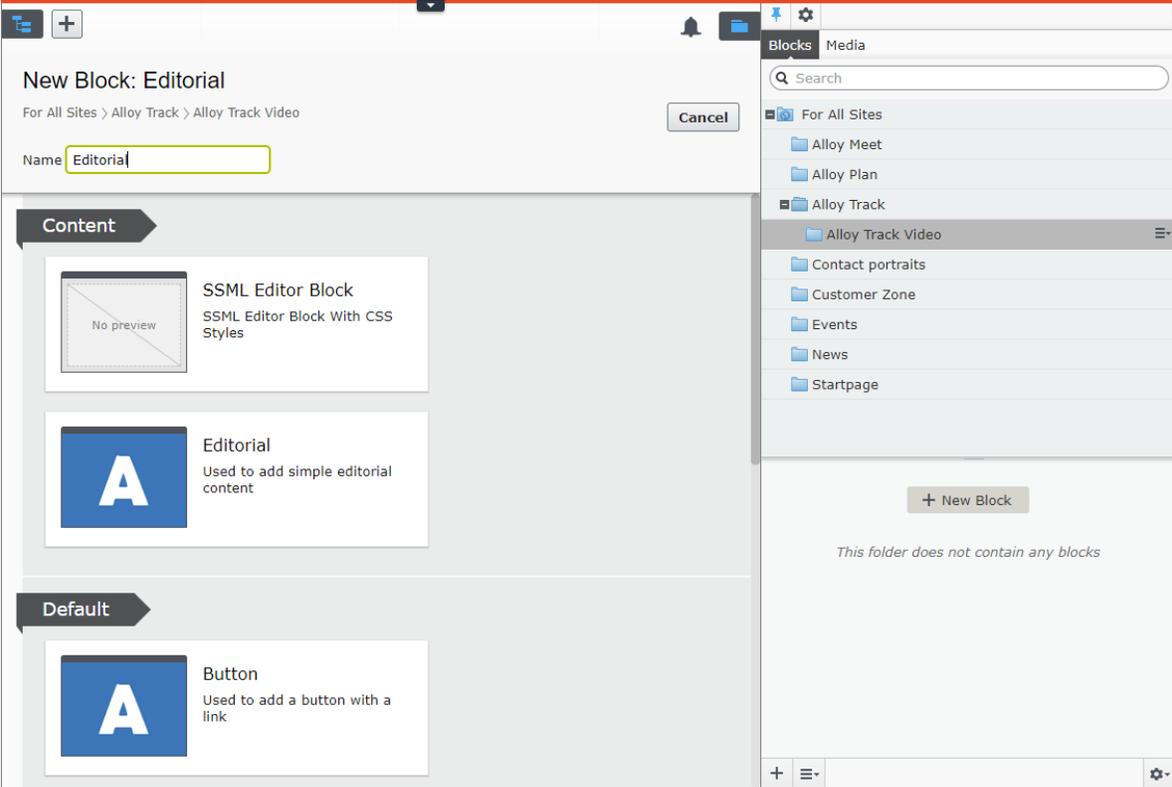
To check the current content approval workflow applied to this page. You can right click the created page, and then go to Edit Approval Sequence



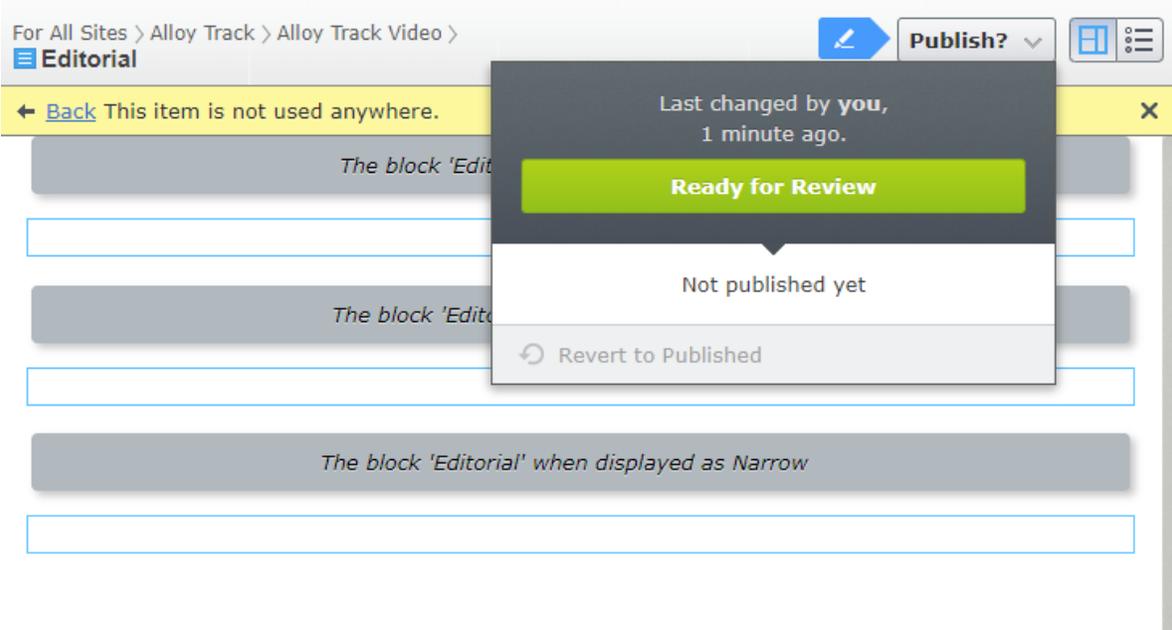
This will display the CMS UI for content approval sequences for this page, but with the content approval definition we defined for this page type



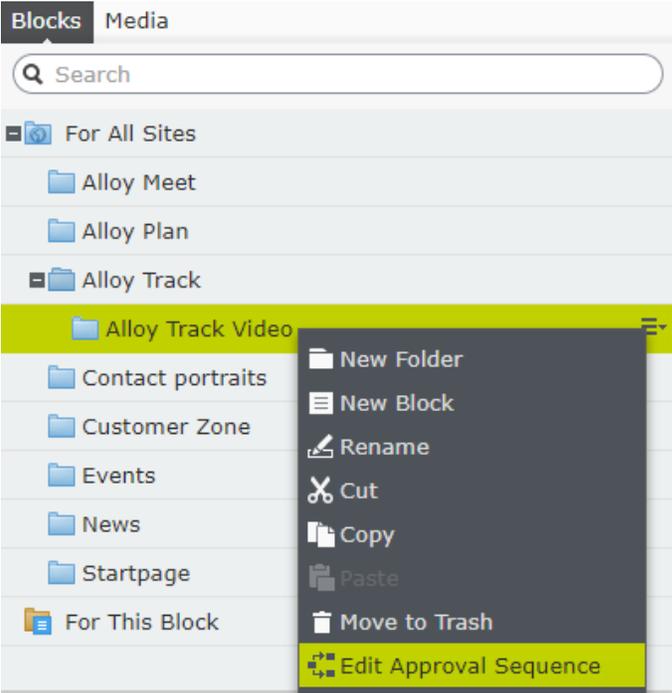
The same applies when we want to create blocks below a specific folder that we selected to be part of a content approval definition. In this case, we will create an Editorial Block below the folder Allow Track Video



As in pages, the block cannot be published immediately. It now requires following a series of steps before being able to be published



To see the current content approval workflow for the folder. You can right click in the folder and go to Edit Approval Sequence



As in pages, this will display the current content approval sequence for this folder based on the content approval definition we created in the plugin

